3: Simutis S-4 (no date) 1942 RB5 Lithuanians RB5

313 439 pansion of the lumber industry the exported products changed. In 1920 69.1 percent of lumber was exported as raw material as against 30.9 percent semifinished items, while in 1921 this percentage changed to 49.9 percent raw as against 50.1 percent semifinished.

In 1939 this industry experienced a severe blow with the seizure of Klaipeda by Germany, the industry having been concentrated in Klaipeda. With the return of the Vilnius region to Lithuania at the end of 1939, the lumber industry was compensated somewhat, but to what extent it was impossible to establish, since seven months later came the Soviet Russian occupation.

PAPER AND PRINTING INDUSTRY

289 433 The paper and printing industry of Lithuania in 1938 employed 2,615 wage earners and accounted for 8.4 percent of the gross value of Lithuania's industrial production and 10.8 percent of the net value. Therefore, from the standpoint both of the number of wage earners employed and of the value of production, it was in the fourth place. Like the lumber industry, it suffered in 1939 when Germany seized Klaipeda where several of the larger printing establishments were located. Before the German occupation of Klaipeda, Lithuania had 88 establishments with 2,679 workers, while thereafter she had 81 establishments with 1,613 workers.[11]

From the statistics available it may be seen that in 1913 this branch of industry was only in its infancy. In that year there were only 20 establishments with 284 wage earners in the province (gouvernement) of Kaunas, while in 1927, in the same region, there were 52 establishments with 2,115 wage earners. The industry reached its high point in 1930,

[11] C.S.B., 1938 and 1939, pp. 170–71 and 160–61 respectively.

3: Simutis S-4 (no date) 1942 RB5 Lithuanians RB5

when it had 64 establishments and employed 2,323 workers. 269 433

As the world depression of 1929 affected Lithuania much later than it did the more advanced industrial countries, the setback in this branch of industry was not felt until 1931, when the number of establishments decreased to 61 and the number of wage earners to 2,157. The all-time low was reached in 1932 when only 1,924 persons were employed. The next year a slight revival was felt and from that year the industry was on the upswing until in the beginning of 1939 it reached an all-time peak with 88 establishments and 2,679 wage earners.

The chief branch of the paper and printing industry is that of woodpulp and paper production. Although this branch is represented by only five establishments, it is greatest from the standpoint of number of workers employed: it accounts for from 40 to 45 percent of all workers in the paper and printing industry. The number employed in woodpulp and paper production was almost the same in 1938 as in 1927—1,159 and 1,133 respectively—although in 1932 it had dropped to 688. The production of woodpulp as well as paper and cardboard has increased very substantially since 1931.

The printing branch of the industry also showed considerable expansion. In 1927 there were 33 printing establishments, with 658 wage earners. By 1938 the industry had 51 printing establishments and 1,153 wage earners and in 1939, 50 establishments with 843 wage earners. Even the depression of 1929 did not greatly affect this branch of industry. Except for a slight setback in 1934 and in 1935, in which years the number of employed decreased to 801 and 777 respectively, the printing business continued to grow.

3: Simutis S-4 (no date) 1942 RB5 Lithuanians RB6

289 The other two divisions of the paper and printing industry, cardboard manufacturing and bookbinding, have a large number of establishments, but account for only about 15 percent of all the workers.

4. The Paper and Polygraphic Industry.

289 433 464 From the standpoint of importance of its rôle in Lithuanian industrial economy, the paper and polygraphic industry stands in the fourth place. In 1937 there accrued to it 8.1% of all industrial workers; 18.1% of the engine horse-power; 8.4% of the gross value; and 10.8% of the net value of Lithuania's industrial production. According to net production value it ranked correspondingly before the timber industry in the third place. Its development since 1927 is illustrated by the following comparison:

	1927		1931			1937		
	No. of Concerns	No. of Workers	No. of Concerns	No. of Workers	Capacity of Engines in H. P.	No. of Concerns	No. of Workers	Capacity of Engines in H. P.
Total	52	2 115	61	2 157	8 777	76	2 559	22 602
Including:								
Cellulose and Paper	5	1 133	4	829	8 143	4	1 180	21 675
Paper and Cardboard Wares	9	284	15	365	145	18	371*)	128
Printing Offices and Book-binderies	38	698	42	903	489	54	1 100	799

Already in an earlier chapter it was pointed out that the paper industry belongs to those branches that have grown least since 1929. The index cited therein shows that the paper industry suffered the greatest setback in the crisis years (in 1932 by 32.3%) and in 1937 exceeded its position of 1929 by only 48.8%.

The explanation given in the previous section for the retrogression of timber production holds good also for the [439] paper industry. The cause of the severe recession of the production index of the paper industry in the crisis years lies in the then curtailment of cellulose export (from 60 781 tons in 1929 to 39 384 tons in 1932) and in the high percentage share of cellulose supplies in the aggregate production of the paper

*) Figures for January, 1938, because the July figures do not reflect the complete employment position.

and polygraphic industry which, measured by gross value, in 1937 amounted to 42%, and in 1932, when the paper production proper still hardly existed, to still more. 289 433

In a calculation converted to the basis year 1931, the production index figures for the paper and polygraphic industry are as follows:

1931	1932	1934	1935	1936	1937
100.0	80.9	122.1	124.5	149.4	177.9

The following statement shows the production quantity figures in tons ascertained for the same years:

	1931	1932	1934	1935	1936	1937
Cellulose	39 300	36 800	56 093	53 957	59 203	66 101
Paper	2 800	2 400	6 214	6 921	7 407	8 922
Cardboard	·	830	681	848	1 047	943

On the strength of these data we may conclude that the cellulose production since 1931 has risen approximately 70%, but has exceeded the position of 1929 by approximately only 10%. The rise in the total production of the paper industry by 77.9% since 1931 is due to the growth of paper production which, as a result of the erection of a paper factory at Petrašiūnai in 1933, has since then more than trebled. Thanks thereto our paper imports since 1933 have receded by two-thirds in round figures.

The index figures calculated on the basis of the value amounts naturally reflect also the development of the remaining branches, for which no quantity data are available. This relates in the first place to the printing business, which has vigorously developed in independent Lithuania (the establishment of over 30 new printing offices in the first years of independence), the output of which, however, during the crisis years suffered a setback, which, especially in 1934 and 1935, exerted a restraining influence on the course of the index curve. 2/4